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FinancialPlanning



Wealthtech Weekly

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Reporter

When ChatGPT first dropped seemingly out of nowhere in November 2022, the ripple effects were immediate and earth-shattering.

As novel as that development was, there were sure to be competitors that expanded on the existing AI technology, but at a lower cost.

That came to fruition last week as Chinese AI company DeepSeek vaulted to the top of the iOS App Store, causing established AI companies to quickly lose footing in the market.

[I spoke with financial advisors](#) about how DeepSeek's sudden rise could affect wealthtech and investing strategies.

As always, thank you for reading. Talk to you next Thursday!

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TOP STORIES

TECHNOLOGY

Advisors look to diversify after DeepSeek's rise, Trump's AI directive



Whether these are watershed moments or not, markets have taken notice of the latest artificial intelligence advancements.

- **Orion, Pontera announce expanded integration to help with held-away assets**

Advisors using Orion Trading can now connect directly into Pontera to integrate clients' 401(k)s, 403(b)s and other held-away accounts.

- **Decoding the mixed crypto signals in Trump's new term**

Crypto enthusiasts' faith is tested as an executive order, a bitcoin sell-off and the introduction of meme coins by the president and first lady mark the first 10 days of his second term.

- **Developing empathy with pro bono clients, even when it's hard**

Advisors who volunteer their time say they are better able to relate to clients when they actively listen, avoid assumptions and feel with their clients, not for them.

- **Trump tariff uncertainty rattles clients as advisors look for hedges**

Advisors say they are watching these changes closely, making portfolio adjustments where needed and generally reassuring nervous clients that they have planned for this sort of volatility.

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